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Issues in Vendor/Library Relations

False Starts, Setbacks, and Great Leaps Forward: Making Progress with ILS Vendor and Book Vendor System Integration

by **Ann-Marie Breaux** (Systems Vendor Liaison, YBP Library Services)

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"...Made the alligators look tame"

— Lyric from "Poke Salad Annie," by Tony Joe White

A couple of years ago, YBP asked me to assume responsibility for building and maintaining YBP's relationships with providers of the major integrated library systems (ILS) used by our customers. Five years ago, such a formalized position would have been a rarity amongst book vendors; now it has become a part of the structure of most large and medium-sized jobbers.

Book vendor technical services have mushroomed since the mid-1990s. Ten years ago, we might have seen some orders faxed to us, and even a few fledgling electronic orders, but for the most part, we received daily mailbags full of paper orders, which we then keyed into our purchasing and fulfillment system. When the books shipped, we included a paper invoice. If the customer desired, we

could provide rudimentary physical processing, such as strengthening of paperbacks or insertion of security devices.

Fast forward ten years and you encounter a complex web of electronic record and physical processing services available from book vendors and supported by ILS vendors, ranging from electronic ordering to cataloging records to electronic invoices. This explosion of capabilities from both the book vendors and ILS vendors offers customers the opportunity to rethink paper-based workflows, speed up manual processes, eliminate keystrokes, and reallocate staff to deal with shifting library priorities.

However, these developments have not been a simple task. The "standards" that we work with – MARC, BISAC, X12,

EDIFACT – are numerous and tend to devolve back into customization. For example, while several ILS vendors now offer EDIFACT ordering, their placements of critical data elements like library account number, purchase order number, and fund code vary. We who receive the orders must modify programs each time we extend our support of EDIFACT to another ILS. Electronic invoicing adds an even greater challenge, as matchpoints become a piece of the puzzle. How will an incoming payment line on an X12 or EDIFACT invoice find the correct order record on which to post? Is it using a number generated from the ILS like a purchase order number or a bibliographic record number? Is the electronic invoice instead using a matchpoint number generated by the book vendor, and if so, how did the library get that vendor number into their order record?

Since YBP's customer base comprises

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mostly academic libraries using one of a small group of systems, we can limit our development efforts, mainly seeking to create interfaces with **DRA**, **Epixtech's Horizon** and **NOTIS** systems, **Endeavor**, **Ex Libris**, **Geac**, **Innovative Interfaces**, **Sirsi**, and **VTLS**. Our development priorities are driven by the size and number of customers we have using a particular system, the existing capabilities of that ILS and how well they mesh with **YBP's** capabilities, the amount of new development required, the demand we anticipate from our customer base, and pressures from numerous other internal development efforts.

As we've worked with various ILS providers, we've learned lessons from each experience. Our earliest partnership with **Innovative Interfaces** showed us the multiple uses of a "loaded" **MARC** record. Once the book vendor could output customized data in prescribed local fields, the **MARC** record was far more than a holder of bibliographic information. It became a transport mechanism and a trigger for the automatic creation of order records and electronic invoicing. The enormous influx of bibliographic and acquisitions piecework created with the arrival of weekly shipments could now be executed with a minimum of time, keystrokes, and staff. Furthermore, **Innovative Interfaces** set an early gold standard for clear, complete documentation of their book and serial vendor interfaces.

NOTIS was an aging mainframe system not designed to support processes like electronic ordering. With further development of **GOBI**, **YBP's** Web-based system, plus an ancient **YBP** pipe-delimited electronic order format, customers like the **University of Florida** and **LSU**, with the help of a talented consultant in the person of **Gary Strawn** from **Northwestern**, devised a way to graft

an electronic ordering capability onto **NOTIS**, and thus decrease time spent per order to a matter of seconds. **Sirsi's** willingness to allow customers to edit its source code offered pioneers like **Alan Hagyard** of the **Connecticut-Trinity-Wesleyan Consortium**, **Chris Hoebeke** of the **University of Virginia**, and **Ranny Lacanienta** of **Brigham Young University** the ability to write code that imports book vendor-supplied **MARC** records into **Sirsi** to create bibliographic records, order records, and electronic invoicing, all with minimal keystrokes.

To date, the most comprehensive development and testing in which I have been involved has been with **Endeavor**. For the rest of this article, I'll concentrate on that experience as a sample of the work involved in testing new functionality. When I inherited my position, **YBP** had a large number of customers eagerly awaiting the new acquisitions capabilities in the 2000 version of **Voyager**. We wanted to be sure that those capabilities were thoroughly discussed and vetted before extending them throughout the **YBP/Voyager** customer base. The **University of Rochester** agreed to become **Endeavor** and **YBP's** test partner in the summer of 2000.

Stanley Wilder, **Rochester's** Assistant Dean for Information Management Services, explains, "The way I remember it, we were plugging away on various aspects of our acquisitions function when suddenly we realized that we'd stumbled on a golden opportunity to re-make Acquisitions from scratch. Part of it was the imminence of **Voyager's** embedded order functionality, part was our new relationship with **YBP**, but there were lots of local factors that came together as well. Working with **YBP** and **Endeavor** on embedded order seemed the obvious next step, and

while the process was longer and more demanding than we'd anticipated, we never regretted that decision."

For both book and system vendors, testing is a many-to-many process. **YBP** has tested capabilities with many ILS vendors. **Endeavor** had to test their new acquisitions capabilities with numerous book vendors (not to mention serial vendors), all with different record creation and acceptance capabilities. **Kathryn Harnish**, **Endeavor's Voyager** Product Manager, explains, "One of the things that we heard a lot of was, 'Every vendor does it differently for every customer!' While the mapping of data from **MARC** records to the **Voyager** order record was certainly different, the issues and concerns that needed to be resolved were almost exactly the same for all vendors."

Representatives from **YBP** and **Endeavor** spent a day at the **University of Rochester** discussing approval and firm order workflows, creating a testing process, and previewing the coming **Voyager** functionality. It was both an exhausting and energizing meeting, as each of the three test partners began to see glimmers of the payoff to come,

as well as the mountain of work involved in getting there. **YBP** was interested in testing all options that a library might select when designing a workflow, so as testing began, we faced a list that included a **MARC**-based approval workflow, two **GOBI** and **MARC**-based ordering workflows, **EDIFACT** ordering, and **EDIFACT** invoicing. We knew that we would need to allocate development resources for

EDIFACT ordering and invoicing. Acquisitions experts, **EDI** staff, analysts, and pro-

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"voice of **Carrie Etter**, a poet unknown to me then living in Santa Monica. She said she knew my poems well enough to recognize my voice and style and felt certain she was in possession of a published poem that belonged to me but had someone else's name on it." Thus began **Neal Bowers** modern day quest for Corvo, only his Corvo is named **David Sumner** - a.k.a. **David Jones** of Aloha, Oregon. The bottom line was that between 1992 and 1994, "a person calling himself **David Sumner** had two of my poems accepted as his own 20 times at 19 different literary magazines." **Sumner** also stole poems of **Mark Strand**, **Sharon Olds**, **Marcia Hurlow**, and **Robert Gibb**. "The quarterlies are already littered with his primary pseudonym - 57 poems attributed to **David Sumner** in 46


periodicals, perhaps all of them other people's work."

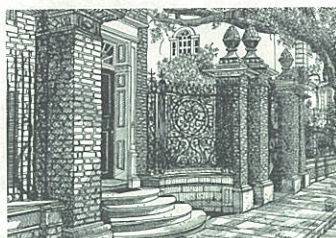
If this were the only story, solve the mystery of who, what and why, it would still be a very good mystery story indeed. But, this is also a story of professional indifference — the unsympathetic colleagues who were mostly indifferent to the plight of **Neil Bowers**. As he says: "Why he doesn't tell his tale is a complicated matter, but it begins with the disparity between his own astonishment and outrage at having been robbed and the indifference with which many regard his plight. 'Lighten up,' they say, 'no big deal.'" And finally: "Relax, you can always write another poem."

The second sadness lies in the editors of all those poetry magazines who accepted works by **Bowers** and others as the original work of **David Sumner** and then offered little if any help in running him down. For his part, **David Sumner**

was clever. He made sure that each poem he used had a new and different title and that at least the first line of the text would be changed.

But in the end, through the hard work and persistence of **Neal Bowers**, assisted by his wife, **Nancy**, some fellow poets, and a private investigator in Portland, Oregon, the plagiarism of **David Sumner** stopped. As **Bowers** puts it: "It seems I have stopped **Jones [Sumner]** from taking my work, as far as I know."

Read as a book of fiction, **Bowers's** tale would be interesting and believable, and in the words of the blurb writer, "a real first-class page-turner." Read as fact, based on real-life doubt and disillusionment, this is a first-rate book based on a sad fact of life. People steal both property and words and in **Neal Bowers's** case, the words are his property. 



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grammers at **Endeavor** worked with us to troubleshoot and fix **Voyager** bugs as they were identified. **Rochester's** systems office loaded an early release of **Voyager 2000**, and then numerous patches as programming was adjusted. They also were responsible for the transmission, retrieval, and loading of approval, order, and invoicing files. **Rochester** acquisitions and cataloging staff oversaw the workflows and made the final decisions about which pieces of functionality were adopted into regular production at the end of the test.

Ultimately, testing involved approximately forty library and company staff members, hundreds of e-mails, dozens of phone calls, several months, and lots of patience. Testing proceeded more slowly than any of us liked. **Kathryn Harnish** explains, "There were lots of workflows to check and lots of pieces of software involved, and hence multiple failure points to test and eliminate. **Endeavor** made modifications to the software many times during the testing period, from changes to the requirements (pulling in things we missed or didn't anticipate) to bug fixes. Without the intensive testing performed by **Rochester** and **YBP**, we wouldn't have been able to forecast and correct those issues. And we would have had lots more folks calling our Support Desk — or **YBP's**." Toward the end of the process, finding a window of time at **YBP** to work on **EDIFACT** invoicing became increas-

ingly difficult as the assigned programmer faced the competing demand of an internal redesign of our warehouse and inventory software.

As the release date for **Voyager 2000** neared and customer demand grew, we streamlined our goals and tried to speed up the process. In late fall, we added **Georgia State University** as a secondary test partner, so that **YBP** could convert them from paper to **EDIFACT** ordering as quickly as possible for the thousands of firm orders they were placing. By **2001 Midwinter ALA**, most everything worked, and we announced our new capabilities to the **YBP/Voyager** customer base. **Georgia State** and the **University of Rochester** now have in place completely redesigned approval and ordering workflows which exploit the full capabilities of both **GOBI** and **Voyager's** expanded **EDIFACT** and new embedded order data functionality. From **Rochester**, **Stanley Wilder** reports, "Our monograph acquisitions process is now significantly less labor-intensive, less error-prone, and faster, and our financial operation has felt the benefits as well." Other **Voyager** customers are adopting various components of the functionality as they migrate to **2000** and have the opportunity to reassess workflows.

Kathryn Harnish from **Endeavor** sums up both the ILS and book vendors' expectations, that we "enter into this as partners, sharing the various costs (time, money, etc.) of the process on behalf of our mutual customers. It's a three-sided process, and it's important that the vendors work together to sup-

port their libraries." **Steve Oberg**, Business Analyst at **Endeavor**, was also heavily involved in the testing and served as the gathering point for bug reports, analysis, and fixes. He continues, "Overall, perhaps the most important factor in the entire process was a common sense one: open communication between all parties involved. Many, many hours were spent on the phone or by email, responding to questions, clarifying functionality, trouble-shooting problems, or simply letting each other know about successes, such as when a particular bug got resolved, or the first time that we got the entire process to work properly from beginning to end at the customer site. I believe the effort spent on open communication by all three sides was what made the final result such a success." **Stanley Wilder** closes, "We librarians have a responsibility to participate in such initiatives from time to time. We cannot expect that complex new functionality just pops out of the box, ready to use. This is especially the case when the technology involves cooperation between vendors, each with their own way of doing things. Someone's got to go first."

I offer **YBP's** thanks to **Rochester** and **Georgia State** for their willingness to tolerate ambiguity, frustration, and setbacks during the testing process, and to **Endeavor** for recognizing the value in working closely with book vendors to develop flexible services that can be easily implemented for multiple customers. Libraries, book vendors, and ILS vendors have come a long way in ten years. 